

CREATING A NEW CUSTOMER ACCOUNT

To create a new 'Customer' account in your CRM

Step 1. Click on Main Menu item "CUSTOMERS"

Step 2. Click on "NEW CUSTOMER"

The screenshot displays the GoMoverz CRM interface. The left sidebar contains a main menu with items: Dashboard, Customers (highlighted with a red box), Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The main content area is titled 'Customers' and shows a summary of customer statistics: 7 Total Customers, 7 Active Customers, 0 Inactive Customers, 7 Active Contacts, 0 Inactive Contacts, and 0 Contacts Logged In Today. Below the summary, there are buttons for '+ New Customer' and 'Import Customers'. A table lists customer records with columns for #, Company, Primary Contact, Primary Email, Phone, Active status, Groups, Date Created, and Realtor Group. The table contains 7 entries. At the bottom, it shows 'Showing 1 to 7 of 7 entries' and navigation buttons for 'Previous', '1', and 'Next'.

#	Company	Primary Contact	Primary Email	Phone	Active	Groups	Date Created	Realtor Group
3	Person - View Profile	Vickie Jackson	vjacksonrealestate@gmail.com	(707) 208 9961	On	Residential Client, Realtor	12/11/2024 6:18 AM	ReMax
4	Person - View Profile	Peter Enzinger	penzinger@outlook.com	(415) 818-2423	On	Residential Client	12/11/2024 8:34 AM	
6	Person - View Profile	Pamela Loar	pametaloar@gmail.com	510-409-2746	On	Residential Client	12/13/2024 9:57 AM	
7	Person - View Profile	Cathy French	dianefre110@gmail.com	(509) 435-5840	On	Residential Client	01/08/2025 9:43 AM	
2	CrossMerg	Peter Enzinger	peter@crossmerg.com	415-818-2423	On	Commercial Client	12/08/2024 8:50 AM	
1	GoMoverz	Nathan Jackson	hello@mygomoverz.com	(707) 208-3515	On	GM Company	12/08/2024 8:30 AM	
8	My Template Account	My Templates	1@gmail.com		On		01/12/2025 7:45 AM	

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Step 3. In the tab "CUSTOMER DETAILS" enter the following items only, not any of the others yet.

- Phone (enter phone in this way 415-457-8754)
- Under the "Groups" click the dropdown and choose "Residential Client"
- Address (if this is an apartment, the enter the main address first, add a coma, then the apt #)
Example: 145 Bradley Square, Apt 32
- City
- State (CA) * always use the CAPITAL LETTERS IN ABRIVIATED FORM
- Zip code

When this information is entered, click SAVE AND CREATE CONTACT.

The screenshot shows the 'Add New Customer' form in the GoMoverz application. The 'Customer Details' tab is selected and highlighted with a red box. The form contains the following fields and values, with red arrows pointing to them:

- Company:** (Empty field)
- Phone:** 415-457-8754
- Website:** (Empty field)
- Groups:** Residential Client (selected from a dropdown menu)
- Currency:** System Default
- Default Language:** System Default
- Address:** 145 Bradley Square, Apt 32
- City:** Fairfield
- State:** CA
- Zip Code:** 94876
- Country:** United States

At the bottom right of the form, there are two buttons: 'Save and create contact' and 'Save'. A red arrow points to the 'Save and create contact' button.

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A Popup Dialog box opens, fill-in all fields that have **RED ARROWS**. *Please note, that you can optionally check the box “Do not send welcome email” yet. We should get your email templates completely developed BEFORE you put these on autopilot.

Also, you can manually set a “Password” or have the system automatically assign these. To do this, I suggest you do, click on the “2 half circle arrows” which will generate the password, then click the “eye” which will show the password so you can keep a copy of it if you want. Also, now or at anytime in the future you can choose the “Send SET password email” to the customer that will send them a “Password Reset” email.

Everything below these sections are configured accordingly, so don’t touch them. If you think you need to call me and we can look through this together so nothing is done by mistake that WILL affect other parts of the System Automation.

Then just click “Save

The screenshot shows the "Add New Contact" dialog box in the GoMoverz software. The dialog box is overlaid on a sidebar menu. Red arrows point to various fields: "First Name" (Sally), "Last Name" (Field), "Email" (sallyfield@gmail.com), "Password" (0xFWao7gz21S), and the "Do not send welcome email" checkbox. A red arrow also points to the "Save" button. A red arrow points to the "Primary Contact" checkbox. A red arrow points to the "Send SET password email" checkbox. A red arrow points to the "do not change these" text, which is positioned above a group of toggle switches for Invoices, Estimates, Contracts, Proposals, Support, and Projects. Another red arrow points to the "do not change these" text, which is positioned above a group of toggle switches for Invoice, Estimate, Credit Note, Project, Tickets, Contract, and Task.

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A new Dialog box will open. This show the “Contacts” tab of the “sub menu” with the “Primary Contact” for the customer account showing. You can add as many “Contacts” as you want in the customer account, but these MUST always be a “Primary Contact”

The screenshot displays the GoMoverz web application interface. At the top left, the GoMoverz logo is visible. A search bar is located at the top center. On the right side, there are navigation icons for Settings, a back arrow, a mail icon, a refresh icon, and a notification bell with a '21' badge. The main content area is titled '#10' and contains a sidebar menu on the left with options: Profile, Contacts, Notes, Statement, Invoices, Payments, Proposals, Credit Notes, Estimates, Expenses, Contacts, Projects, Tasks, Files, Reminders, and Map. The 'Contacts' option is highlighted with a red box. The main content area shows a 'Contact' dialog box with a '+ New Contact' button, a search bar, and a table of contacts. The table has columns for Full Name, Email, Position, Phone, Active, and Last Login. One contact is listed: Sally Field with email sallyfield@gmail.com and an active status. A red arrow points to the 'Sally Field' name, labeled 'customer "Primary Contact"'. Another red arrow points to the '#10' account number, labeled 'customer account number'.

Full Name	Email	Position	Phone	Active	Last Login
Sally Field	sallyfield@gmail.com			<input checked="" type="checkbox"/>	

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Step 4. Click on the “Profile” tab directly under the “Customer Account Number” which will show the Customers main account screen.

Now click on the Billing & Shipping” tab under the Profile.

Here, you can click on the words “Same as Customer Info” and “Copy Billing Address” which automatically pulls in the information you enter when creating the New Customer account in Steps 1-3 above.

Then click “Save”

The screenshot displays the GoMoverz software interface. On the left is a navigation sidebar with options like Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The main area shows the profile for customer '#10 Sally Field'. The 'Billing & Shipping' tab is selected and highlighted with a red box. Below this tab are two columns of address information: 'Billing Address' and 'Shipping Address'. Each column has fields for Street, City, State, Zip Code, and Country. The 'Billing Address' fields are populated with '145 Bradley Square Apt 32', 'Fairfield', 'CA', '94876', and 'United States'. The 'Shipping Address' fields are identical. A red box highlights the 'Billing & Shipping' tab. Red arrows point from the 'Profile' tab in the sidebar to the 'Billing & Shipping' tab, from the 'Same as Customer Info' text to the 'Billing Address' fields, from the 'Copy Billing Address' text to the 'Shipping Address' fields, and from the 'Save' button to the bottom right of the form.

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Step 5. Click on Main Menu item "CUSTOMERS"

This will reveal all your customers. You'll see the new customer you created, in this case it's **Sally Field**

The screenshot shows the GoMoverz web application interface. On the left is a navigation menu with items like Dashboard, Customers, Sales, Expenses, Contracts, Projects, Tasks, Leads, Estimate Request, Knowledge Base, Utilities, Reports, and Setup. The 'Customers' menu item is highlighted with a red box. The main content area is titled 'Customers' and shows a summary of 8 Total Customers, 8 Active Customers, and 0 Inactive Customers. Below this is a table of customer records. The table has columns for #, Company, Primary Contact, Primary Email, Phone, Active, Groups, Date Created, Deposit Required, and Realtor Group. The row for 'Sally Field' (ID 10) is highlighted with a red box, and a red arrow points from the 'Customers' menu item to this row. Other customers listed include Vickie Jackson, Peter Enzinger, Pamela Joar, Cathy French, Peter Enzinger (CrossMerg), Nathan Jackson (GoMoverz), and My Templates (My Template Account).

#	Company	Primary Contact	Primary Email	Phone	Active	Groups	Date Created	Deposit Required	Realtor Group
3	Person - View Profile	Vickie Jackson	vjacksonrealestate@gmail.com	(707) 208 9961	Active	Residential Client, Realtor	12/11/2024 6:18 AM		ReMax
4	Person - View Profile	Peter Enzinger	penzinger@outlook.com	(415) 818-2423	Active	Residential Client	12/11/2024 8:34 AM		
6	Person - View Profile	Pamela Joar	pamelaloar@gmail.com	510-409-2746	Active	Residential Client	12/13/2024 9:57 AM		
7	Person - View Profile	Cathy French	dianefre1100@gmail.com	(509) 435-5840	Active	Residential Client	01/08/2025 9:43 AM		
10	Person - View Profile	Sally Field	mengler1345@gmail.com	415-457-8754	Active	Residential Client	01/13/2025 9:59 AM	\$878.87	
2	CrossMerg	Peter Enzinger	peter@crossmerg.com	415-818-2423	Active	Commercial Client	12/08/2024 8:50 AM		
1	GoMoverz	Nathan Jackson	hello@mygomoverz.com	(707) 208-3515	Active	GM Company	12/08/2024 8:30 AM		
8	My Template Account	My Templates	1@gmail.com		Active		01/12/2025 7:45 AM		

THAT'S IT, YOU'RE DONE CREATING A NEW CUSTOMER